

Pet food and pet care: a growth market in 2022, with cat and dog food driving sales

The 16th edition of the Assalco-Zoomark Report highlights how pet owners now devote as much attention to their pets' diets as they do to their own

15th May 2023 – There are nearly **65 million pets** in Italian households, including nearly **9 million dogs and 10 million cats**. Food products for these species represent the main segment of the domestic pet food and pet care market.

In 2022, sales of **dog and cat food** products totalled **€ 2,759 million** in the Italian market¹. Compared to the previous year, sales by value were up **11.4%**, influenced by the strong inflationary dynamics in all product categories. In terms of volume, more than **673 thousand tons** were sold, an increase of **0.8%** over 2021.

Cat food accounted for **53.8%** of total value, with sales of just over **€ 1,484 million**. **Dog** food, on the other hand, accounts for **46.2%** of the total market, **€ 1,275 million**.

An extensive overview of the market is being presented today at Zoomark International 2023, with the publication of the **16th edition of the Assalco-Zoomark Report**². This publication, produced annually by Assalco, documents the evolution of the pet food and pet care market and the importance of pets in the family and society.

*"Today more than 40% of Italian households have at least one pet. The importance of our relationship with our pets is undeniable: they keep us active, help alleviate stress and are a valuable antidote to loneliness," commented **Giorgio Massoni, president of Assalco**. "Pets are bona fide members of the family, and we are now devoting more time to them, and paying more attention to their diet and well-being. This increased attention is reflected in a market that, even in a difficult year like 2022, continued to perform well".*

This year's Assalco-Zoomark Report takes an in-depth look at the main **trends** driving pet food purchases. An analysis of product labels shows the factors that influence purchases of human food also apply to pet foods: the main trends are indeed "rich in", "free from" and Italian-made products.

REDUCING THE RATE OF VAT ON DOG AND CAT FOOD: A SIGN OF PROGRESS

For pet-owning households, pet food and veterinary care represent essential goods and services. At Zoomark International, Assalco therefore reiterates its support for the appeal made by consumer associations, veterinarians, animal rights associations and the industry to **reduce the rate of VAT** on pet food and veterinary care **from 22% to 10%**.

*"It doesn't seem right that the 22% rate should be applied to pet food, as if it was a luxury good. In Germany, in view of the fact that these products are used every day, and considering the role of pets in society, the VAT rate on food for dogs and cats is in fact set at 7%", explained **President Massoni**.*

FOODS FOR OTHER TYPES OF PETS ALSO SAW GROWTH

According to estimates formulated by Euromonitor, in Italy there are almost 30 million fish, 13 million birds and nearly 3.2 million small mammals and reptiles in Italy. In 2022, the market for food for these pets grew in volume by **2.3%** and in value by **5.6%**, with a turnover of nearly **€ 13.2 million** in the world of large-scale retail.

The main segment is **bird** food, which accounts for 43.7% of value and 47.6 % of volume, with sales up 6.3% in value and volumes remaining stable. This is followed by **rodent** foods, which also saw growth: up 7.7% in value and 2.4% in volume compared to last year.

¹Data for the Grocery channel, Traditional Petshops, Petshop Chains and Supermarket Petshops, gathered by Circana

²The following contributed to the 16th edition of the Assalco - Zoomark Report: Circana, GS1 Italy and the Italian National Association of Veterinarians (ANMVI). The digital version of the Report can be found on the site Assalco.it

HYGIENE PRODUCTS LEAD THE PET CARE SECTOR

In 2022, growth was also seen in the market for hygiene products, toys and accessories - namely leashes, kennels, bowls, cages, aviaries, aquariums, turtle tanks and various utensils. In the large-scale retail channel, sales rose by **3.2%** to **€ 80 million**, equating to a 1% increase in units sold.

The **hygiene** segment is leading the way (from pee pads to wipes, shampoo, brushes, deodorants, care and beauty products): **+11.7%** in value and **+6.9%** in volume.

Cat litter products, which are considered separately, represent the most important non-food category in the large-scale retail channel. In 2022 this market was worth more than **€ 87 million**, with a positive trend in both value, up **+9.7%**, and volume, **+1.9%**.

THE GROCERY CHANNEL WAS HIT HARDER BY INFLATION

In 2022 all the main distribution channels showed more growth in value than in volume. The biggest divide was in the **Grocery** channel, which accounts for 59% of total pet food sales (i.e. € 1,628 million) and where inflation hit hardest. In this channel, sales by value rose by 14%, while volume only increased by 0.4%.

The remaining sales were divided between **Traditional Petshops** - 5,000 stores in Italy which account for 24.4% of the market (€ 673.8 million in sales in 2022), **Petshop Chains**, which are worth about 14% of the total value (€ 385.1 million), and **Supermarket Petshops**, the newest distribution format, which saw sales of € 72.7 million and captured 2.6% of the total sales of dog and cat food.

For further information:

ASSALCO - Press Office

Silvia Vergani silvia.vergani@b-story.eu tel. +39 349 7668102
Massimo Spagarini massimo.spagarini@b-story.eu tel. +39 340 3587701

ASSALCO - The Italian National Association for Pet Food and Pet Care Companies, brings together the leading companies in Italy's pet food and pet care industry, representing **more than 85% of the national pet food market**. On a European level, ASSALCO belongs to FEDIAF, the European Pet Food Industry Federation.